

# Vocational Resources Plus LLC

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## VOCATIONAL ASSESSMENT & EVALUATION REPORT - SAMPLE

Evaluee's Name  
Month XX, 20XX



### INTRODUCTION

A vocational evaluation is an integral component in vocational rehabilitation. It sets the foundation for future services. An evaluation begins by interviewing the individual and gathering relevant work-life background information. Sources of information arise from personal contacts, vocational worksheets, review of case file information, behavioral observation, and vocational consulting expertise.

The assessment process includes identifying the evaluatee's vocational strengths, employment interests, skills/aptitudes, behaviors, and general readiness for work. Research is performed and data is analyzed to evaluate whether or not the individual could return-to-work, and if so, at what. The outcome of the evaluation is detailed to provide direction toward appropriate occupational placement. Areas of concern or need and other pertinent vocational-related factors are presented to support future placement services.



### CASE ACTIVITIES

Preliminary actions regarding the case and chronology of case activity performed by the vocational consultant is described.



### INITIAL VOCATIONAL INTERVIEW

Details on the date, place, and time of the meeting are presented. The individual's presentation, personality traits, appearance, communication style, along with pertinent information in regards to pre-meeting communications and documentation submittal is reported. The information that follows in this section will basically be a transcript of questions asked and information shared during the initial interview.

### BACKGROUND

Family matters, vocational issues, and an abbreviated version of the individual's life history are described.

### EDUCATIONAL AND VOCATIONAL HISTORY

Educational and vocational historical details are qualitatively listed. The individual's current status including recent employment periods are detailed. Positions held with specific employers, length of employment, duties performed, and other details on the individual's educational and vocational history are succinctly described. Information is also reported from the individual's completed generic application. Historical information about the individual's learning capabilities, strengths and weaknesses in academic areas, and working environments is brought to light.





## EMPLOYER INFORMATION/VOCATIONAL TRAINING

If the individual recently separated from an employer, or is currently employed, detailed information on the most recent job description, responsibilities, accountabilities, training, and work performed is identified. First-hand accounts of the employer's hiring practices and needs are described. Additional analysis on vocational training, college coursework, and employment-related data is supplemented as needed.



## VOCATIONAL SKILLS ASSESSMENT

The individual's knowledge base, good worker skills, functional skills, and technical skills, along with abilities, aptitudes and other vocational skills and indicators are appraised. Good worker skills allow a worker to adapt to situations or many jobs. Functional skills are general skills useful in a variety of jobs. Technical skills apply to a specific job or occupation. In addition, Accomplishments, volunteer, avocational activities and hobbies are included, bringing additional skills brought to light.

## TRANSFERABLE SKILLS ANALYSIS (TSA)

Transferable skills are the accomplishments and understandings an individual has developed in various situations that can be used in many other situations. Transferable skills are acquired through jobs, school work, projects, parenting, hobbies, sports, volunteer work, avocational pursuits and leisure activities. Transferable skills can be divided into three subsets: working with people; working with things; and working with information and data. Transferable skills are critically analyzed and are cross transferred to numerous occupations. A bulleted list of skills and qualifications are highlighted. This section is incredibly important and is useful when preparing target resumes.

## VOLUNTEER BACKGROUND

A volunteer background is extremely advantageous when searching for a job. It tells prospective employers that you care about other areas of life and are engaged in your community.

## HOBBIES OR AVOCATIONAL ACTIVITIES

Hobbies, interests or pastimes, either current or from the past, reveal insight into your interests are or what makes you enthusiastic outside of work. The activities are undertaken for pleasure or relaxation, during one's leisure time.



## WORKER CHARACTERISTICS

The individual's worker characteristics are scaled and reported. Worker characteristics are the knowledge, skills and/or abilities necessary for the minimum acceptable performance of any job duty (often relative to a position description). Results of self-appraisal and worksheet responses are delineated. In addition, the concepts of employability, hireability and placeability are discussed.

## EMPLOYABILITY

In simple categorical terms, employability is about being capable of getting and keeping fulfilling work. The individual's employability is discussed in detail. Temperament, personality, attitude, motivational clues, and other employability characteristics are listed.

## HIREABILITY

"Hireability" is a way of describing the likelihood that an individual may get hired for a job they are physically and psychologically capable of performing. From a hireability standpoint, the individual's presentation is critiqued, job searching skills are assessed and other issues are discussed relative to the potential to attain employment.

## **PLACEABILITY**

“Placeability” is partly about how in-demand the individual’s skills are and how well she or he can interview. The concept of being placed in the workforce is described in direct relationship between the individual and the professional counselor’s experience in the field of placement.

## **WORK AND CHARACTER REFERENCES**

It is very important for a job seeker to have reliable work and character references. References often provide what employers are looking to find out about a job candidate. Employers look to find information on how someone previously performed on the job. Employers are also interested in learning about positive personal and professional qualities and attributes of a good worker and/or member of society.



## **HEALTH AND PHYSICAL CONDITIONS**

The individual’s current health and physical conditions are documented based on the interviewee’s subjectivity, response to questions, the interviewer’s observations, and rehabilitation counseling methods. Implications and outcomes regarding the individuals: Quality of Life, Activities of Daily Living, Locus of Control, Substance Abuse or Addiction, Smoking, Alcohol, Nutrition, Exercise, and General Health along with Medication Management, Sleep Issues, Mental Health, and Alternative Therapies are discussed. Physician findings and other professional healthcare providers or therapist comments are briefed.



## **FUNCTIONAL IMPAIRMENT/PHYSICAL AND/OR PSYCHOLOGICAL LIMITATIONS**

Functional limitations and beliefs of restrictions are documented on the interviewee’s subjectivity, responses to questions, the interviewer’s observations and rehabilitation counseling methods. Functional Capacity Evaluation results are explained. To explain impairment or limitation in lay person terms, comments from providers are offered.



## **PSYCHO-SOCIO-ECONOMIC FACTORS**

The individual’s current socio-economic factors are documented. Vehicle, residence, income, investments and other economic factors are listed. Workers’ compensation issues are addressed. The individual’s sphere of influence and support system are identified. Values and social position relative to others is described from the individual’s point of view. Descriptions of the individual’s personal contact with employers and experiences with employed individuals are also presented.



## **WORKER STYLE PREFERENCES AND VOCATIONAL INTERESTS**

The individual’s worker style preferences and vocational interests are identified. Work values and ethics are addressed. The response to the ultimate question regarding what the individual would like to do for a living not considering any parameters is reported. Upon vocational counseling, “A Realistic” occupation or position is identified. The individual’s “Beliefs of Potential Success” are highlighted and an assessment of the individual’s realm of knowledge regarding “Labor Market Realities” is reported.





### **VOCATIONAL PLANNING IDEAS**

Based upon the individual's skills and experiences, aptitudes and natural talents, ideas relative to occupations, career choices and various work environments are presented. In the event the individual has already considered future work, that information is described and methods and procedures to plan and prepare for the goal are delineated. Specific support services provided by the counselor are described.

What employers seek in applicants becomes matched with what is established within the individual. Results of any career assessment or other testing instrument are revealed. Vocational planning ideas are presented.



### **PERTINENT INFORMATION OR CONCERNS**

Concerns regarding vocational self-concept, an assessment of general readiness to return to work, and the individual's perspective of the process of return to work are established. An assessment is performed based on the individual's perception of work tasks and physical limitations. If supported by the needs on the case, psychometric testing is recommended or administered, scored and discussed with the individual, with observation and results of testing reported.

The individual's job seeking abilities and level of job seeking performance is assessed. Areas of disinterest, weakness, challenge, obstacle, limitation, restriction, and threat are analyzed. Any issue regarding motivation, accommodation, and other factors or aspects relative to return to work that may interact with the placement process is made. An impression of the need for vocational guidance and job seeking skills training is offered.

Detail on the individual's knowledge of how to access employment opportunities in the labor market is made. Specific examples of concern are presented. For example, when discussing positions, such as a file clerk, dietary aid, restaurant crew worker, security guard, etc., or in performing light duty jobs at [a specific Employer Name] that the individual excludes based on what he or she believes cannot physically be performed are detailed. The individual's predisposition and attitude towards work, along with any self-imposed limitations are described. Any other concerns are presented, especially regarding the individual's understanding of the working world and with placement services.



### **IMPRESSION/RESOURCES**

A professional opinion in regards to the individual's capacity to pursue an effective job search campaign is offered. Additionally, a statement regarding the individual's employment outlook is made. Transferable skills and worker characteristics are matched with occupations that are in demand within the individual's labor market.

Local resources, research activities, and referrals to lead the individual to a number of avenues to explore options, gather first-hand information, and gain experience regarding the world of work are provided. Notation that the average job seeker would take full advantage of readily available job seeking resources to help with a successful transition to suitable employment based on individualized decision making and informed choice is highlighted.



### **RECOMMENDATIONS**

Based on the evaluator's understanding of the individual's goals, vocational counseling services and placement programs may be recommended to include potential timeframes and outcomes. Additional vocational analysis and specific referrals to assist the individual in any area of need is made available, if beneficial, to any party involved on the case.



### CONCLUSION

Conclusions on the bottom line of the individual's potential for successful employment are presented. Wage and occupational statistical information is referenced if applicable. Approval or recommendations for specific future services (example: comprehensive placement services) are pre-scheduled for initiation, or authorization is requested.

Sincerely,

*Amy E. Botkin*

Amy E. Botkin, MS, CRC, CLCP  
Certified Rehabilitation Counselor / Certified Life Care Planner

Enclosures are submitted when they add value to the bottom line

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